



CSAP's Southwest CAPT Prevention Briefing

December 2002 / January 2003

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Providing support and resources for developing knowledge and expertise among prevention professionals and practitioners

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10 Steps for a Successful Meeting

You don't get better at doing something unless you stop to think about what you've been doing – to analyze your process.

—How to Make Meetings Work

Meetings – just the word conjures up emotional images for us – both positive and negative. From on-site staff meetings to multi-agency collaborative meetings and from conference calls to meetings online, we all have them and most of us have strong feelings about them – one way or the other.

The business sector has long been concerned with effective meetings. In business, versus the public sector, time is more directly tied to dollars. Regardless, time wasted with ineffective meetings is a drain on organizational finances and more importantly, member morale and productivity. The direct connection of time and money may be less clear in the work of community coalitions however the frustration of poorly planned and unsatisfying meetings remains, often costing a coalition its members. Taking the time to plan for a meeting — to get the most from the time invested — is vital to retaining active community members/volunteers.

There are no high school or college courses in *Meetings 101* and yet virtually everyone is a participant in or a leader for a meeting at some point. All meetings have within them seeds of opportunity. Whether gathering a large community group to address substance abuse issues or holding a small monthly staff meeting, all meetings require addressing some basic components to be successful.

1. Clarify the purpose for the meeting.

Determining why a group should meet is the first step toward a successful meeting. Defining the purpose helps a group clearly focus and creates a reason to attend and participate.

2. Define the desired outcome of the meeting.

Set both the task outcome and the experiential outcome for the meeting. What is it the group wants (or in some cases needs) to accomplish from the meeting? When the meeting is over, what will the experience have been like for the group? By setting goals for both the tangible and experiential outcomes, the group is setting up its own expectations—as well as setting intentions—for the meeting results and its overall tone.

3. Design the meeting agenda and objectives.

Identify the meeting activities/agenda items and then consider the flow of the items. What items inform other items, and can be sequenced to provide continuity and avoid choppy, fragmented piece-meal discussions. Pay attention to each agenda item, particularly the purpose of each item, and indicate the purpose on the agenda to guide the group. Some items may be for informational purposes while others need discussion and perhaps a decision. By adding this small but important feature to the agenda, meeting participants can be clear on the expectation and better meet the intent and needs of the group.

4. List the participants and their role in the meeting.

Determine who will or should attend the meeting, list the meeting roles needed, and note the agreed upon ground rules. It's always a good idea to revisit the ground rules at each meeting in order to include any additional thinking from those who may be new to the group. Remember to indicate who is taking responsibility for each agenda item.

5. Set a realistic meeting time frame.

Decide not only when you will start the meeting but when you will end the meeting as well. This sets up an expectation among participants and supports them being able to schedule other work or activities. Be realistic in the amount of work the group will be able to accomplish in the time allotted and make adjustments in the agenda as needed. Some groups who tend to have a lot to cover will opt to prioritize the agenda at the beginning of the meeting so they are certain to cover the most critical items.

6. Finalize the logistics.

Select and confirm the location, audio/visual equipment, room set-up, and refreshments. You will also want to consider whether you will need a registration table, any money handling, name tags/tents, newsprint and markers, tape, notepads, pens, etc.

Room set-up is important. It helps create conditions for success. Consider what the group will be *doing* during the meeting. Will there be interaction and participation or simply presentation and limited discussion? How much space will be needed for movement? Will they need wall space to place newsprint? Will the room require a microphone and if so which type – lavalier or hand held — will work best to accomplish the agenda.

7. Make final agenda revisions.

By this time you will be closing in on a final agenda determined by the size of the group, time, people and information available. These final revisions allow for the preparation of meeting packets to be sent in

advance of the meeting or for distributing to members at on-site registration.

8. Communicate with participants.

Invite all meeting participants and include information they may need about the agenda, their various roles, anything they may need to bring with them, beginning & ending times, parking, etc.

9. Room Set-up.

An hour before meeting time, especially if you are in a space or location that is new to you, be sure to check that the space is set up as needed, all AV equipment is working properly, flip chart and supplies are in place, and any wall décor is appropriately placed around the room. Take note of where the restrooms are located in order to inform the group early in the meeting process. Finalize any arrangements for refreshments.

10. Mentally prepare yourself.

Given the pace with which most of us work, it is always a good idea to take a few moments prior to every meeting to take a few deep breaths and turn your attention to being present to the meeting itself. Set your intention for the meeting to be all that it needs to be. If you have time, you might take a few extra minutes to rehearse the meeting in your mind.

A important final note: Consider how you will evaluate the meeting. Responses will help you determine whether your meeting achieved the results you intended. Evaluation can be as simple as asking the group for "pluses" and "wishes" around the time spent. A more formal evaluation based on the meeting objectives is desirable, particularly if the group is very large or diverse.

Tool: If you would like a *Meeting Preparation Checklist* that follows the tips mentioned here, visit the following link at CSAP's Southwest CAPT website. You may print and use the Checklist, courtesy of SunWalker Enterprises. <http://www.swcapt.org/products/workgroups.html>

This Prevention Briefing is based on the training materials "Clues to Effective Meetings". Sunny Walker, SunWalker Enterprises.

Recommended reading:

How to Make Meetings Work by Michael Doyle and David Straus (available at most bookstores)

No More Teams, Michael Schrage, (1995) Doubleday

Making Meetings Work: Achieving High Quality Group Decisions, John Tropman (1996). Sage.

Recommended websites:

Institute of Cultural Affairs

This website offers resources and links for increasing facilitation skills and group success. Check out the publications, training, and facilitation methods sections of the website.

<http://www.icacan.ca/home.cfm>

International Association of Facilitators (IAF)

The IAF web page contains a myriad of resources for meetings including technology assisted meetings, consensus building, strategic planning, and other facilitation tools.

www.iaf-world.org

3-M Meetings Website

This website is a significant site for planning and hosting effective meetings. While the site is a commercial website and does promote 3-M products, it remains a good resource for brief articles and advice, community forum, meetings cartoons, and more.

www.3m.com/meetingnetwork/

Articles online:

The Seven Sins of Deadly Meetings

<http://www.fastcompany.com/online/02/meetings.html>

Running Effective Meetings

<http://www.hightechcareers.com/docs/effective.html>